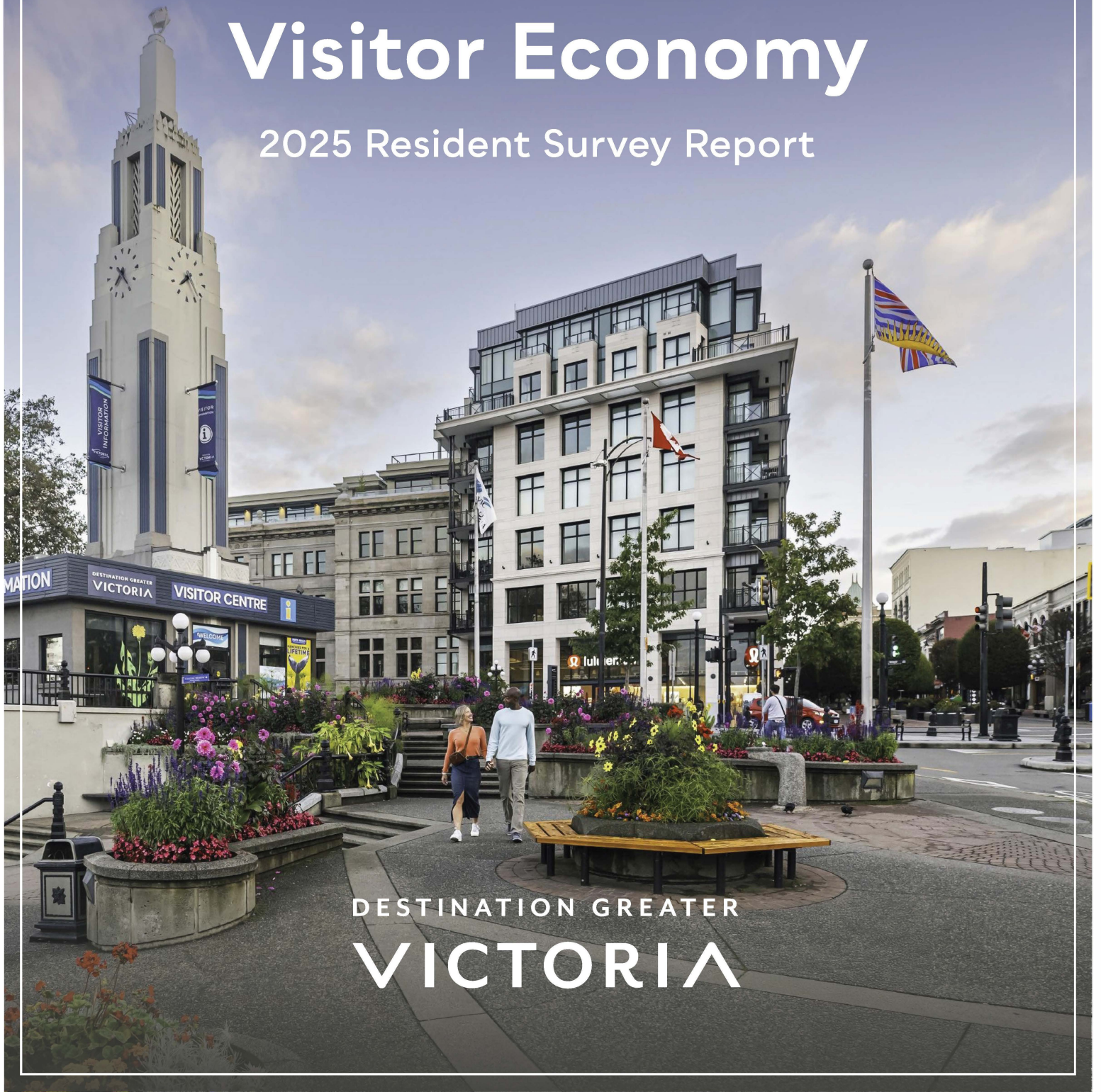


DESTINATION GREATER VICTORIA

Resident Perceptions of Greater Victoria's Visitor Economy

2025 Resident Survey Report

DESTINATION GREATER
VICTORIA



Destination Greater Victoria recognizes, with respect, that its office is located on the Territory of the Ləkʷəŋən People, now known as the Songhees Nation and 'Xwsepsum Nation. Destination Greater Victoria, as the official destination marketing organization for Greater Victoria, also respectfully recognizes that it operates on the Territory of the WSÁNEĆ Nations (W̱JOŁEŁP (Tsartlip), BOKÉĆEN (Pauquachin), SṪÁUTW̱, (Tsawout) W̱SIKEM (Tseycum) and MÁLEXEŁ (Malahat)), and the Sc'ianew (Beecher Bay), T'Sou-ke, and Pacheedaht Nations.

1. Objectives

Greater Victoria is a globally recognized destination that welcomes almost five million visitors each year. Destination Greater Victoria (DGV) is the region's official not-for-profit destination marketing and management organization working with industry, municipalities, local communities, and approximately 950 member businesses across Greater Victoria to drive visitation and steward economic benefits from tourism in a sustainable manner.

Given the strong post-pandemic recovery and recent growth in tourism, the factors influencing why people visit, and the impacts of their visits, have become increasingly complex. With an ongoing strategic focus on supporting a vibrant year-round visitor economy, Destination Greater Victoria is committed to listening to residents, understanding their perspectives, and ensuring its work aligns with community values.

Past research on residents' views took place before COVID-19 and involved smaller groups focused on specific questions. To provide a more complete and up-to-date picture, Destination Greater Victoria commissioned Discovery Research to conduct an in-depth survey with a larger group of residents across our region. The main goals were to learn about:

1. Residents' perceptions of tourism and Greater Victoria's visitor economy,
2. How tourism affects residents and to what extent
3. The value residents place on tourism, and
4. Residents' views on priorities and opportunities for Greater Victoria's visitor economy.

This report highlights key findings from the research.

2. Executive Summary

A comprehensive survey of residents in Greater Victoria reveals that sentiment toward tourism is overwhelmingly positive. Nearly 99 per cent of respondents agree tourism is important or very important for Victoria and the surrounding region. A total of 1,450 respondents from 13 Greater Victoria municipalities participated in the survey, making it the largest number of participants for a DGV-led resident survey to date.

One of this year's most revealing findings comes from the question: "Does Greater Victoria attract too many, not enough, or just the right amount of visitors?" According to respondents, more than 87 per cent of residents feel that current visitor levels are just right or not enough.

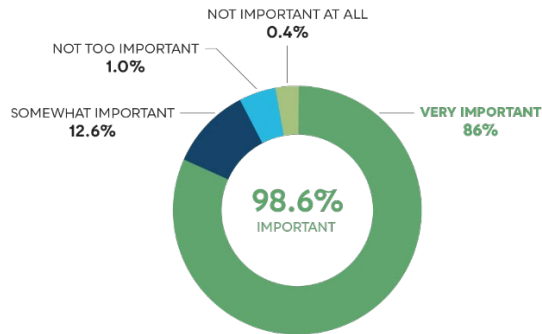
DGV initiates resident surveys every few years to ensure that the perspectives and priorities of local residents are central to the region's tourism strategy. The survey provides valuable insights into the community's outlook on responsible growth, and the benefits tourism brings to Greater Victoria. Destination Greater Victoria contracted an experienced, qualified third party Canadian firm, Discovery Research, to conduct the survey over two waves, in November and December 2024, and in February and March 2025.

The findings also reinforce the value residents place on tourism, with 93 per cent stating that tourism is good at supporting jobs for people living in Greater Victoria and 91 per cent agreeing it benefits local businesses.

Tourism is an engine for small and medium-sized enterprises and a vital part of our community's success, especially during uncertain times. The good news is that our latest data shows the people of Greater Victoria recognize this, and they support not just the current level of tourism, but also the responsible growth of our visitor economy. The industry creates jobs, drives local spending, and enhances our communities and neighbourhoods. Destination Greater Victoria is grateful to residents for believing in the positive impact of welcoming visitors to our beautiful region.

Community support for tourism has continued to grow in recent years and Destination Greater Victoria's commitment to a sustainable and inclusive tourism sector that reflects both resident priorities and economic opportunity is reinforced by the results of the resident survey. DGV will use this feedback to inform ongoing tourism marketing, community engagement, and long-term planning.

Residents' perceptions of tourism's importance to Greater Victoria

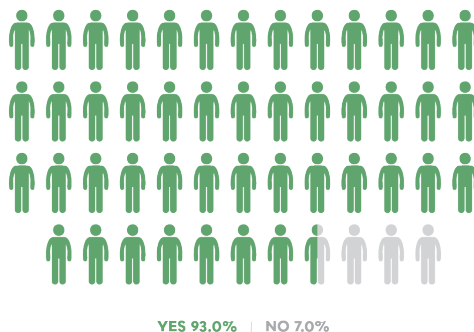


Does Greater Victoria attract too many, not enough, or just the right amount of visitors?



*Of these, 99% stated this was seasonal rather than all year and 60% stated only in Summer

Tourism is good at supporting jobs in Greater Victoria



Tourism benefits local businesses



RESPONDENTS

1,456 Interviews
+ 545 Online



TIMING

Nov-Dec 2024
& Feb-March 2025

3. Results and Insights

The information offered various insights into how residents view Greater Victoria’s visitor economy, including their thoughts on tourism's value, its effects, and the possible opportunities it brings.

3.1 Perceptions of Tourism

Residents overwhelmingly recognize the value of tourism to the local economy and community. Most believe tourism strongly supports local businesses (91 per cent) and provides important jobs for residents (93 per cent). A solid majority also feel tourism plays a meaningful role in supporting Indigenous heritage and culture (73 per cent), highlighting the sector’s capacity to contribute to cultural appreciation and awareness.

Residents overwhelmingly view tourism as a significant driver of economic growth, job creation, and cultural enrichment in Greater Victoria. Despite some acknowledging potential environmental considerations, the overall sentiment is strongly positive, with the community recognizing the numerous benefits tourism brings to the region.

Table 1: Residents’ perceptions about specific aspects of tourism in Greater Victoria.

Perspective	Yes	No
Is tourism good at supporting local businesses?	91%	9%
Is tourism good at supporting jobs for residents?	93%	7%
Is tourism good at supporting Indigenous heritage and culture?	73%	27%
Does tourism create environmental problems?	66%	34%

3.2 Importance of Tourism

Nearly 99 per cent of respondents stated that tourism is important for Greater Victoria, with 86 per cent considering it very important (Figure 1). Respondents indicated that the main reasons for such high importance are:

- Economic benefits, including supporting local businesses and creating jobs.
- Promoting community growth and development of infrastructure.
- Contributing to social vibrancy and cultural exchange.
- Generating revenues and building regional prosperity.

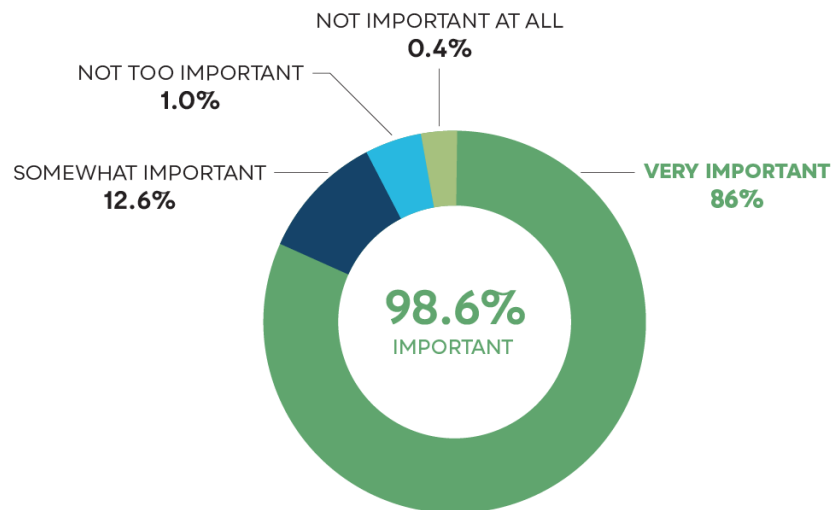


Figure 1: Residents' perceptions of tourism's importance to Greater Victoria.

Similarly, almost all respondents stated it is important that tourism generates taxation revenues for local and provincial government, while most considered it important that tourism brings diversity and different cultures to the region.

When respondents were asked to specify the overall value of tourism to Greater Victoria using a scale from 1 (no value) to 10 (very valuable), the median score was 9 (Figure 2). These results collectively confirm that (a) residents consider tourism very important for Greater Victoria, (b) tourism is seen as providing a wide range of economic, socio-cultural, and facility benefits for communities, and (c) these benefits outweigh potential disadvantages.

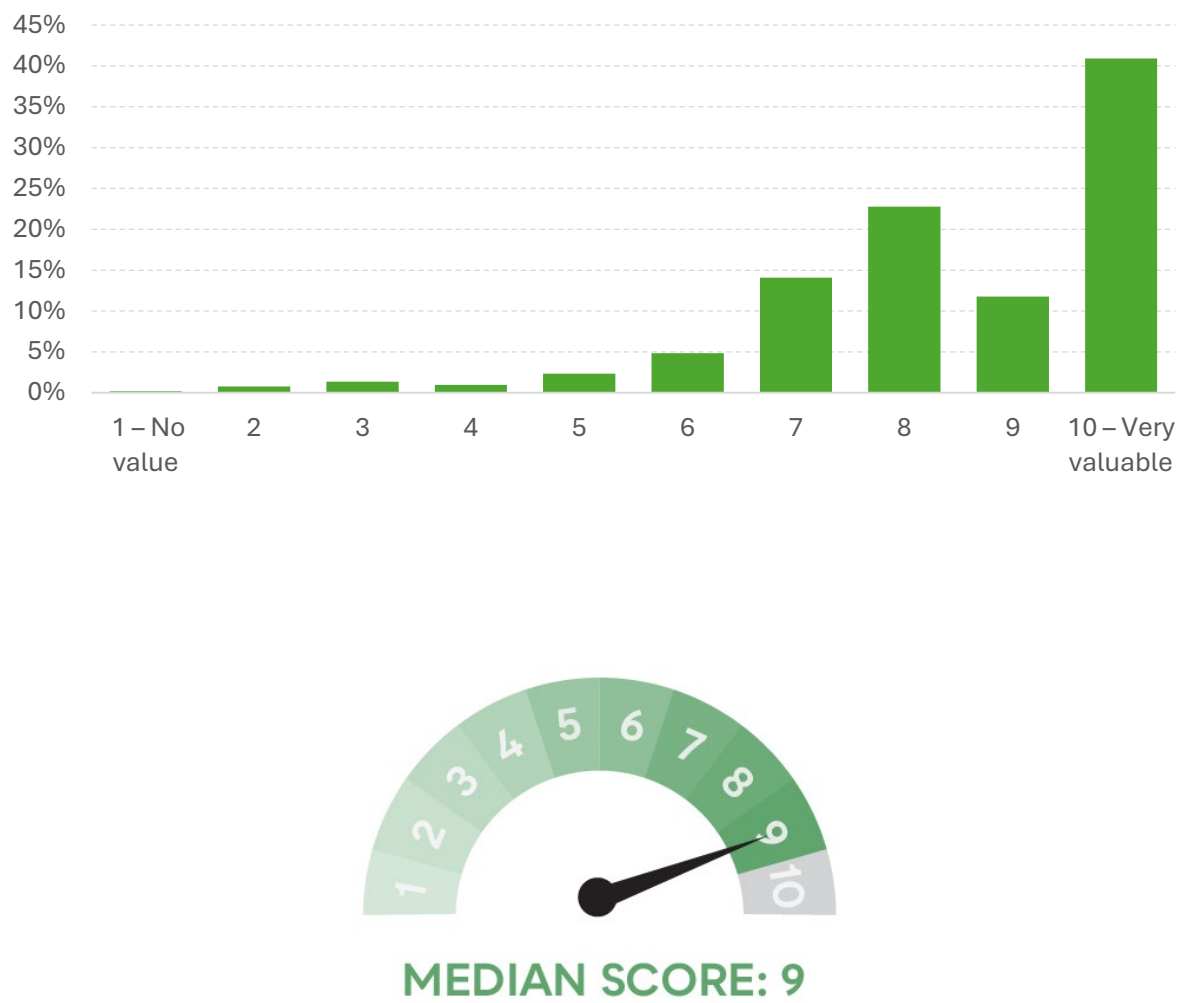
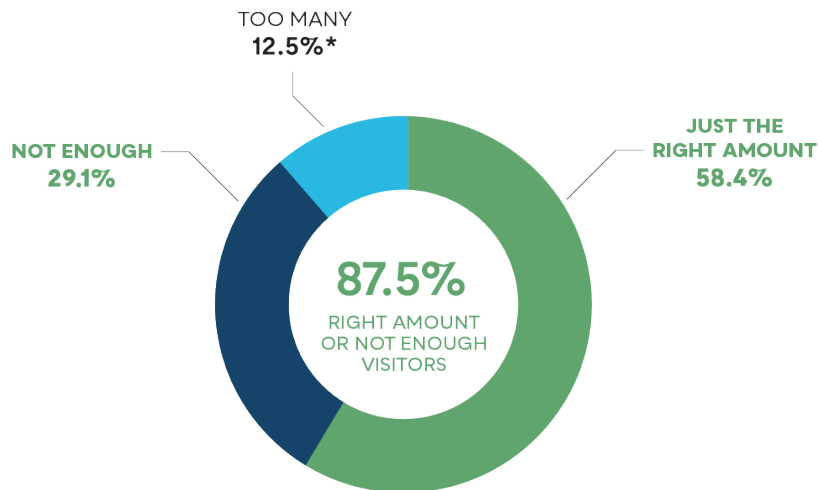


Figure 2: Residents’ median score for the value of tourism to Greater Victoria (n=518).

3.3 Levels of Visitation

When respondents were asked whether Greater Victoria attracts too many, not enough, or just the right number of visitors, more than 87 per cent of residents feel that current visitor levels are just right or not enough (Figure 3). Only a small proportion felt there are too many visitors, noting this is mainly during the summer season rather than year-round and tended to be more focused on particular areas and not a general sentiment.



**Of these, 99% stated this was seasonal rather than all year and 60% stated only in Summer*

Figure 3: Residents' perceptions of the number of visitors to Greater Victoria (n=1,201).

Most residents are satisfied with the current number of visitors to the region, and there is strong support for continued growth in visitation. At the same time, feedback reinforces the importance of ensuring that tourism development remains sustainable and aligned with community values. Thoughtful planning will help maintain a positive balance in areas that experience higher visitor concentrations during peak periods.

3.4 Impacts of Tourism on Greater Victoria

To gauge how tourism is perceived to impact Greater Victoria, particularly in relation to quality of life for residents, respondents were asked to indicate the extent to which they agreed, were neutral about or disagreed with a range of statements regarding potential impacts.

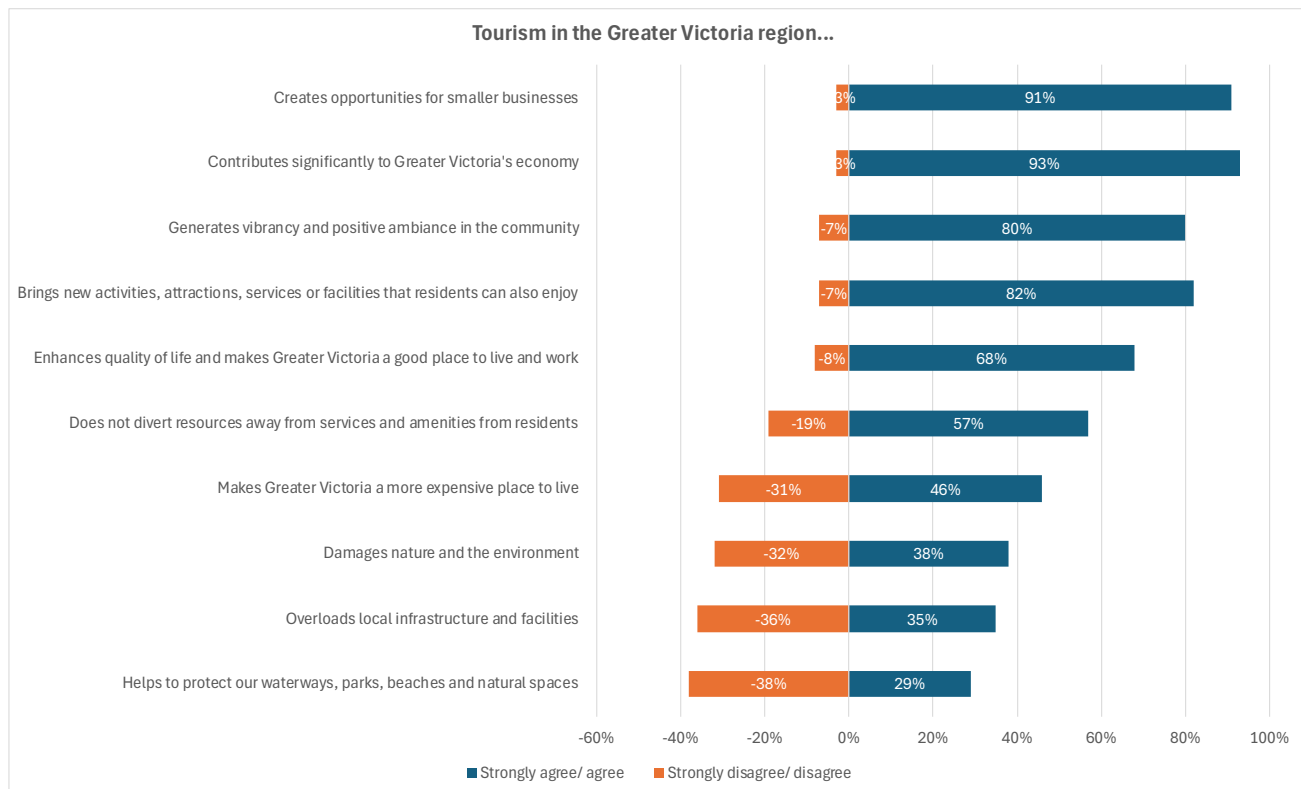


Figure 4: Residents' perceptions about impacts of tourism in Greater Victoria.

These results show that Greater Victoria's residents perceive tourism positively in terms of the economic contributions and business opportunities it generates. Tourism is also perceived to contribute to new facilities, services and activities for residents, while not diverting resources away from foundational community services and amenities.

Importantly, most residents view tourism as increasing community vibrancy and enhancing quality of life, which in turn helps to make Greater Victoria a desirable place to live and work.

Collectively, this feedback not only indicates Greater Victoria's visitor economy is perceived to add value for residents, but also that the way tourism is conducted is aligned with community values.

While residents overwhelmingly recognize the benefits of tourism, it is clear some have thoughtful perspectives about ensuring growth remains balanced and sustainable. A portion of respondents feel that a thriving visitor economy can contribute to higher living costs, and others highlight the importance of protecting natural spaces, parks, beaches, and waterways as visitation grows. Opinions are mixed on whether tourism places pressure on local infrastructure and facilities - 35 per cent agreed, 36 per cent disagreed, and 29 per cent were neutral - reflecting a healthy diversity of viewpoints that can help guide future planning.

As well, some identified areas where environmental impacts can be better managed. When asked about the types of environmental challenges associated with tourism, respondents most frequently cited pollution from cruise ships, increased waste and garbage, land degradation, noise and air quality issues, resource use, and impacts on marine ecosystems and habitat. These findings point to clear opportunities for continued focus on environmental stewardship as the visitor economy grows.

3.5 Priorities and Opportunities for Tourism

Tourism development is generally considered most enduringly effective and sustainable when undertaken in alignment with community values, with input from residents. To gauge resident sentiment about the foundations for this in Greater Victoria, respondents were asked whether developing tourism has community importance, how they view their interactions with visitors, and whether they feel they have a voice in how tourism occurs.

Results (Figure 5) confirm residents believe the development of tourism facilities and services is important for communities (85 per cent strongly agree or agree, n=525). Similarly, residents view their interactions and encounters with visitors quite positively (81 per cent strongly agree or agree, n=525). This suggests there is solid grounding for further development of tourism in ways that are mindful of residents. However, only 29 per cent agreed that they can have a say in how tourism occurs within their community with another 33 per cent neutral. This indicates there is scope to do more to engage residents in tourism planning and development, including finding ways for residents to provide input and feedback.

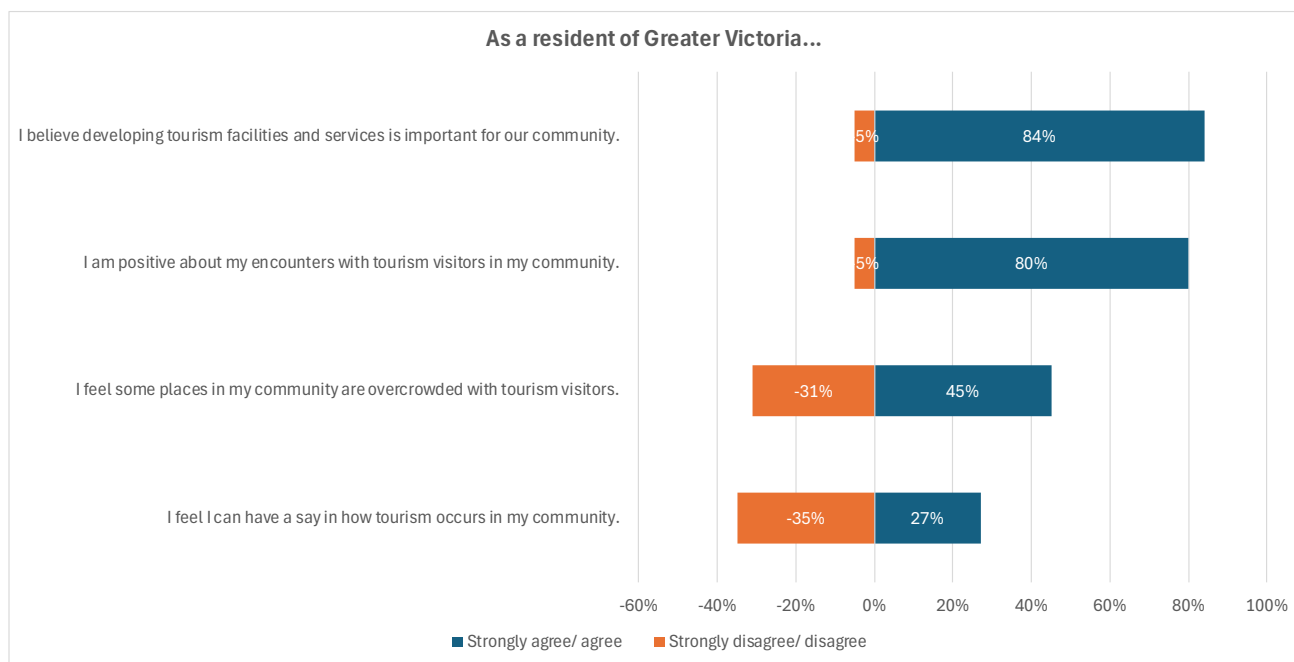


Figure 5: Residents' sentiment about community involvement in tourism (n=489 to 525).

Respondents were provided with a list of potential priorities for tourism and asked to rank the three most important for the industry to focus on over the next five years. Priorities ranked top were scored 3, priorities ranked second were scored 2, and those ranked third were scored 1. Scores were summed to obtain an overall score for each potential priority, which indicated its relative importance for residents (Figure 7).

1. Building year-round tourism to support businesses and jobs all year
2. Enhancing tourism's environmental sustainability
3. Providing activities and experiences that residents can also enjoy
4. Ensuring tourism provides benefits for local residents
5. Promoting Indigenous heritage and tourism experiences
6. Promoting Greater Victoria as a great place to visit
7. Promoting conferences, festivals and major events
8. Promoting and hosting sports events
9. Developing new tourism products and activities

Figure 6: Potential tourism priorities over the next five years (n=524).

Although each potential priority received first, second, and third rankings (indicating none are irrelevant or unimportant), residents regard tourism's main priorities as supporting year-round business and jobs while enhancing the visitor economy's sustainability. Ensuring benefits for residents, through facilities or activities as well as economically, is seen as an important area of focus for the next five years, and likely to be central to maintaining social license. Residents also regard promotion of Indigenous heritage and tourism experiences as a main priority going forward, highlighting not only that there are opportunities to do more in this area, but also the value of messaging such work effectively to the broader

community. While sports hosting and developing new tourism products or activities ranked relatively low among the priorities, both should still be considered very important because they contribute to the year-round visitation that drives business and jobs all year, thereby supporting the top-ranked priority.

When respondents were asked about the biggest opportunities (rather than priority) for tourism in Greater Victoria over the next five years, their answers emphasized five core themes:

- Finding ways to grow and diversify tourism more sustainably.
- Supporting green practices and providing more eco-friendly tourism initiatives.
- Hosting more conventions and sports events.
- Expanding authentic cultural tourism experiences.
- Developing more tourism-related infrastructure and technology.

These themes are consistent with the feedback provided by residents for other aspects of this research; they are also strategically important for aligning the visitor economy with residents’ perceptions and preferences.

3.6 Cruise Visitation

When participants were asked about the effects of the cruise industry on Greater Victoria, more than 84 per cent viewed the impact positively (Table 2). When comparing residents who live within the City of Victoria, who are closest to cruise tourism, to those who live outside the city, there were no significant differences in how they rated the impacts of cruise activity.

Table 2: Residents’ perceptions of impacts of the cruise industry for Greater Victoria (n=1,339).

Perceived Impacts	Proportion of Respondents	
Very positive	48.0%	84.1% positive
A little positive	36.1%	
A little negative	11.4%	15.9% negative
Very negative	4.5%	

Respondents most often based their views of the cruise industry's impact on Greater Victoria on two factors: its economic benefits and its environmental effects.

Overall, the results confirm a large majority of Greater Victoria's residents view cruise tourism positively, with almost half considering it very positive. This is because cruise visitation is seen to deliver economic benefits and support local businesses. Although those who reside further from core cruise activities are more likely than City of Victoria residents to rate cruise as very positive, proximity to cruise activities does not seem to be a main differentiator of perceptions about cruise. However, despite its benefits, many residents feel cruise tourism has room for improvement, especially environmentally.

Main themes for respondents perceiving cruise impacts as positive:

- Good for local businesses.
- Spending by cruise visitors is valuable and brings money into the local economy.
- Supports local jobs.
- Adds vibrancy and makes Victoria feel busy.
- Showcases the destination.

Main suggested areas for improvement in the cruise ship industry:

- Reducing pollution and waste.
- Minimizing impacts on marine environment.
- Reducing crowds, noise, and/or traffic congestion during peak periods.

Notably, when respondents were asked whether tourism creates environmental problems for Greater Victoria, almost one-third (33 per cent, n=1,268) mentioned "cruise ships" as a significant contributor.

3.7 Impacts of Accommodation Availability and Costs

In recent years, hotels, B&Bs and other commercial accommodations in Greater Victoria have seen sustained increases in occupancy levels and average rates. Alongside this there are significantly fewer short-term vacation rental (STVR) properties, notably within the City of Victoria, in response to provincial government regulations. Without any prompting about this, respondents were asked whether the availability and/or costs of accommodation locally had affected visits by family or friends, during the past year compared to previous years.

Results show that most visits by friends or family are not negatively impacted by accommodation availability, with 77 per cent reporting no impact. Although accommodation costs influenced 47 per cent of visits, this did not generally prevent travel. Only eight respondents said that their friends or family chose not to visit in the past year due to cost or availability. For the majority of visits during the past year, family or friends stayed with respondents in their home (58 per cent, n=1,449).

Table 3: Impact of accommodation availability and costs on visits by family or friends.

Impact on Visits by Family or Friends	Yes	No
Visits adversely affected by accommodation availability? (n=923)	23.2%	76.8%
Visits adversely affected by accommodation costs? (n=941)	47.1%	52.9%

When impacts on visits did occur, respondents most often noted three adjustments: shorter stays due to cost considerations, earlier planning to secure affordable accommodation, and allocating more of the travel budget to lodging rather than activities.

Respondents were also asked whether they have been affected by government regulations that limit the number of short-term vacation rental properties (e.g. Airbnb, VRBO) in Greater Victoria. The vast majority (85 per cent, n=1,405) reported no impact. Among those who commented, many noted that reducing STVRs has not yet translated into noticeable improvements in housing affordability, rental prices, cost of living, or financial planning.

4. Conclusion

The 2025 Resident Survey provides compelling evidence that tourism remains a highly valued and broadly supported element of Greater Victoria's economy and community life. Residents clearly recognize the sector's role in sustaining local businesses, creating employment, enhancing cultural vibrancy, and contributing to the region's overall livability. Importantly, the majority of residents view current visitation levels as appropriate and continue to support the responsible growth of the visitor economy.

At the same time, the findings highlight important expectations for how tourism should evolve. Environmental stewardship, protection of natural spaces, and balanced management of seasonal pressures - particularly in peak summer areas and in relation to cruise activity - emerge as essential considerations for the years ahead. Residents' strong emphasis on sustainability, year-round tourism, and local benefits reinforces the importance of aligning economic growth with long-term community well-being.

The survey also identifies a clear opportunity to strengthen residents' sense of participation in tourism development. While residents generally support tourism, many feel they would like to have more opportunities to voice how it is planned and managed. Enhancing communication and engagement will be critical to maintaining social trust and community alignment as the visitor economy continues to evolve.

Taken together, these findings affirm that Greater Victoria is well positioned to advance a visitor economy that is resilient, inclusive, and environmentally responsible. By grounding future strategies in resident values and lived experience, Destination Greater Victoria can continue to foster a tourism sector that delivers shared prosperity while preserving the qualities that make the region an exceptional place to live, work, and visit.

Appendix 1: Methods

This section explains the research approach, outlines data collection methods, and highlights key sample characteristics. The chosen methods matched the research scope, ensured broad and representative sampling, and produced robust sample sizes for analysis at multiple scales.

Results exclude respondents who declined to answer or stated they did not know or were unsure, leading to variation in sample size. Sample size also varies according to whether the question was part of the intercept interview (maximum n=1,456) or the follow-up survey (maximum n=545).

4.1 Approach and Data Collection

We chose a two-phase approach to data collection to meet the research objectives and explore a wide range of questions. Interviewers collected demographic information and responses to direct yes/no or multi-option questions most effectively through in-person interviews. Respondents provided answers to ranking or Likert scale questions through an online survey, which they completed at their own pace and at a time that suited them best. We used two linked surveys, each designed to gather specific types of information:

- A semi-structured intercept interview conducted in person with residents (the Intercept Survey) and
- A structured questionnaire completed online one to three weeks following the interview (the Online Follow-Up Survey).

We collected data across all days of the week and core times of day at locations where residents from various communities were likely to be present, ensuring accurate representation. We engaged Discovery Research to assist with developing survey materials and sampling plans, and to coordinate and conduct data collection. Discovery Research has worked with Destination Greater Victoria for similar projects previously, bringing experience, familiarity and alignment to this research.

4.2 Intercept Survey

Interviewers conducted semi-structured, in-person intercept surveys with up to 24 questions, recording responses electronically. These sessions did not include incentives. Each session lasted 10 to 15 minutes and focused on key tourism topics:

- perceived value and importance of tourism,
- visitor volumes,
- availability and affordability of accommodation for family and friends,
- impacts of short-term vacation rentals and cruise business,
- costs and/or benefits of tourism for the local economy and environment, and
- gender, age, community and length of residence.

After each interview, interviewers thanked participants and asked if they would opt in to a brief online follow-up survey. Those who agreed provided their email address.

4.3 Online Follow-Up Survey

Within one to three weeks after their intercept interview, participants who opted in received an email link to the online survey. Respondents had two weeks to complete the eight-question survey, which included multiple choice, open-ended, and Likert scale items about Greater Victoria’s visitor economy and local tourism priorities. To encourage participation, respondents could enter a CAD\$500 gift card draw. The survey took 10 to 15 minutes to finish.

4.4 Sampling Effort

The survey team conducted intercept sampling in two waves: November 20 to December 12, 2024, and February 20 to March 13, 2025, deliberately avoiding the busy holiday season. Interviewers worked at Mayfair Shopping Centre and downtown Victoria, including Wharf Street, Blanshard Street, the Inner Harbour, and the Royal BC Museum¹, to reach residents from all over Greater Victoria and boost efficiency. They completed 60 shifts and nearly 400 hours of interviews, covering all days of the week and main times to ensure a representative sample.

Location	Sampling Shifts		Sampling Hours	
	n	<i>Proportion of total</i>	n	<i>Proportion of total</i>
Mayfair Shopping Centre	31	52%	217	55%
Downtown & Royal BC Museum	29	48%	178	45%
Total	60	100%	395	100%

Prospective respondents were approached opportunistically by interviewers roaming at each location. Before commencing an interview, each respondent was assured their answers would remain anonymous and confidential, only aggregated results will be reported, they could skip any question they prefer to not answer, and they can end the interview at any time. Overall, a total of 1,456 residents of Greater Victoria completed an intercept interview, and 545 of these also completed the online follow-up survey.

4.5 Profile of Sample

Benchmarking for the Victoria Census Metropolitan Area (CMA), based on Statistics Canada’s most recent population census in 2021, confirmed the sample was sufficiently representative of Greater Victoria’s residents in terms of age distribution (Figure 7) but over-

¹ Permission to conduct interviews on-site during both waves of data collection was provided by Mayfair Shopping Centre and the Royal BC Museum before sampling commenced.

representative of respondents identifying as female for gender: proportions were 59% females, 39% males and 1% non-binary, and 1% declined to answer. Accordingly, data were weighted by factors of 0.86 for female respondents and 1.22 for male respondents to align with census benchmarks.

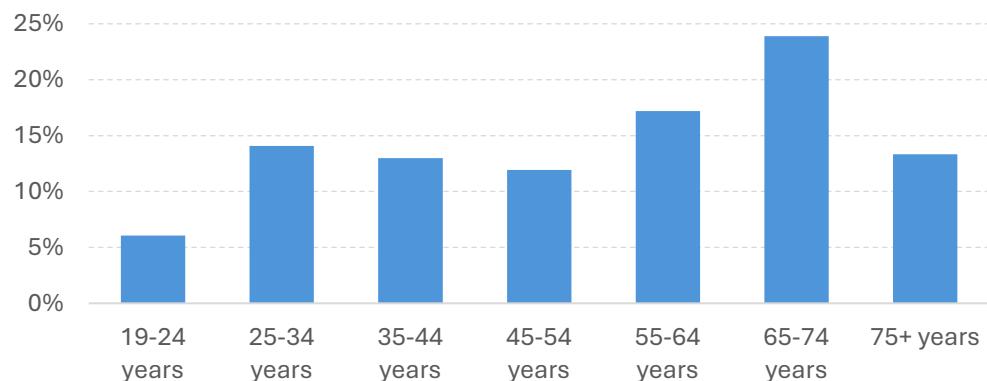


Figure 7: Age distribution of survey respondents (n=1,456).

Participants had lived in Greater Victoria for varying lengths of time, from recent arrivals to long-term residents. Nearly half had resided there for over two decades, and 60% for more than ten years, suggesting they were highly familiar with both the area and its tourism trends and effects.

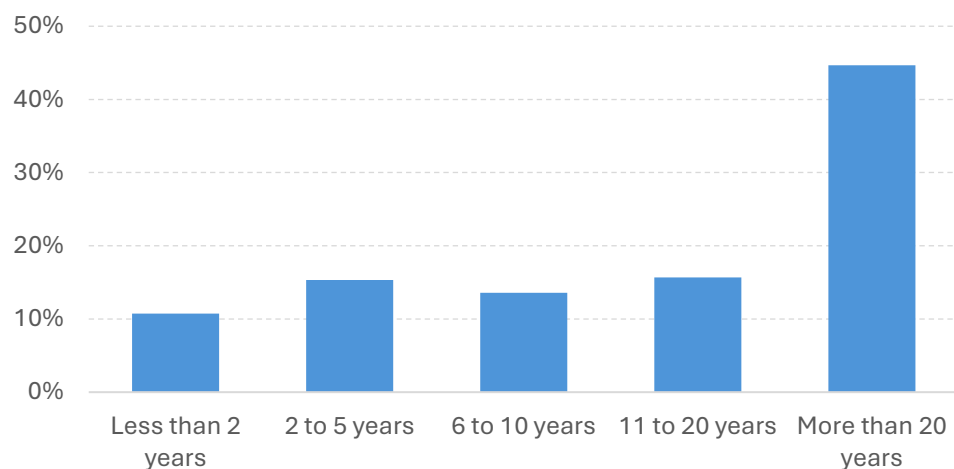


Figure 8: Respondents' duration of residence in Greater Victoria (n=1,456).

The sample comprised respondents from each community or municipality in Greater Victoria (Figure 9) to ensure the data were representative and inclusive. Notably, the largest proportion of respondents (44%) reside within the City of Victoria, which is generally considered the core hub of visitor presence for the region. This ensured residents living within closest proximity to most tourism activities were well represented in the sample.

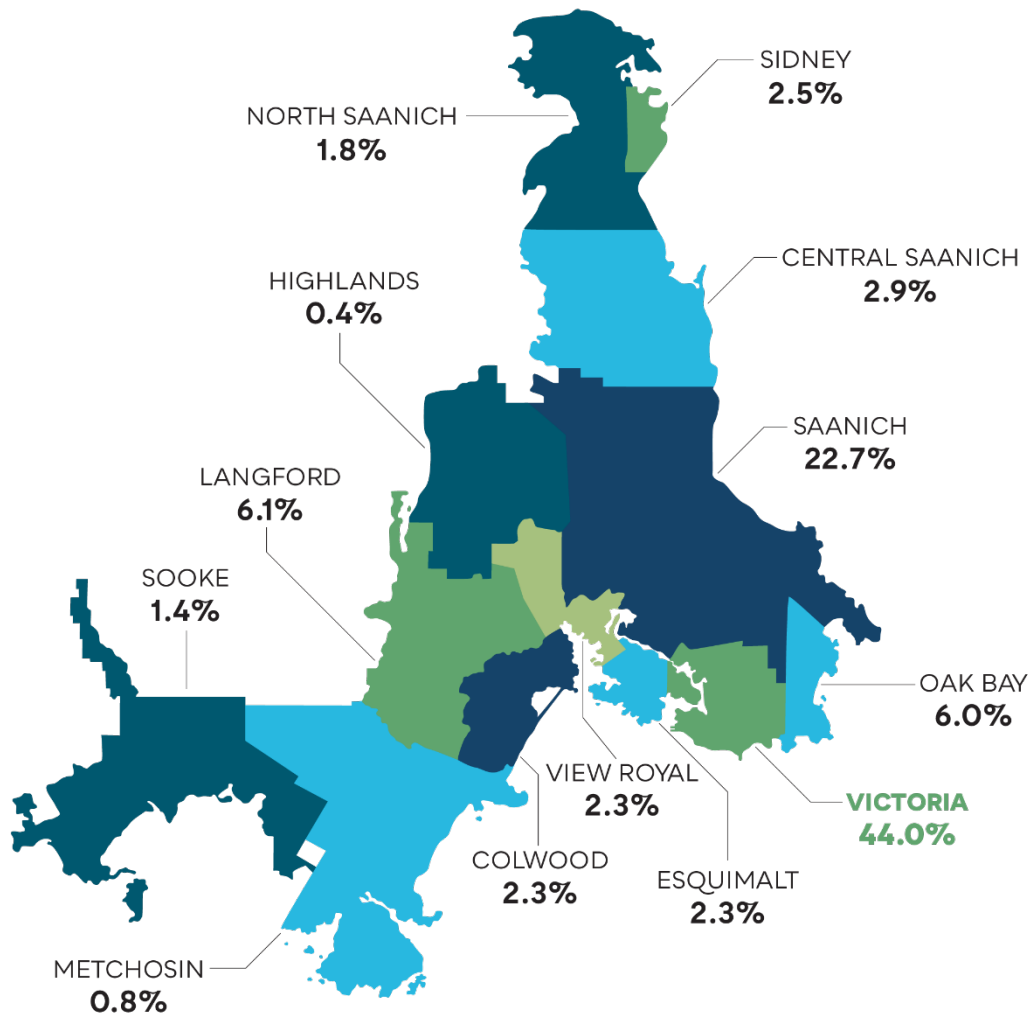


Figure 9: Distribution of respondents across Greater Victoria's municipalities (n=1,456).

Appendix 2: Acknowledgements

Destination Greater Victoria gratefully acknowledges the key role and great work of the team at Discovery Research for coordinating and conducting data collection for this project, as well as collating the data sets for analysis.

Destination Greater Victoria also thanks management and staff of the Royal BC Museum and Mayfair Shopping Centre for their support in facilitating data collection throughout the project.